



David H. Slaughter
Director

Mission Statement

The Real Estate Services Department partners with county departments and other public agencies to develop innovative, professional processes and provide cost-effective, efficient, high quality and timely support to accomplish their real estate needs to include lease negotiations and documentation, property management, appraisal services, right-of-way acquisitions, land and building purchases, surplus property sales and maintenance of the database inventory of county-owned buildings, land and leased facilities.

GOALS

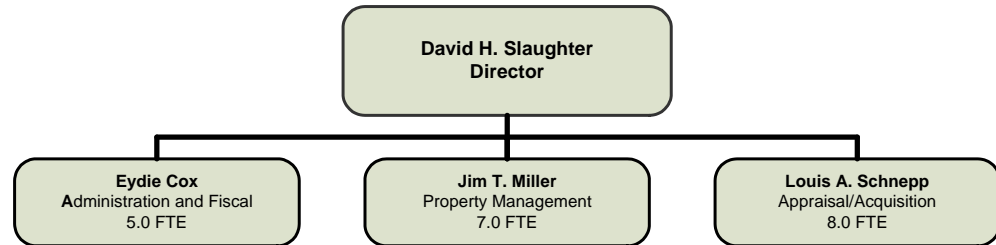
IMPROVE THE QUALITY AND PROFESSIONALISM OF SERVICES

IMPROVE FISCAL SERVICES BY AUTOMATING MANUAL FISCAL FUNCTIONS AND SYSTEMS

IMPROVE CUSTOMER SERVICE WITH DEPARTMENTS THAT LEASE NON-COUNTY OWNED SPACE AND/OR LEASE COUNTY-OWNED SPACE TO OTHERS

REAL ESTATE SERVICES

ORGANIZATIONAL CHART



DESCRIPTION OF MAJOR SERVICES

The Real Estate Service Department (RESA) negotiates and administers revenue and expenditure leases on behalf of county departments. More than 300 revenue leases allow for the use of county-owned facilities, generally at county parks and airports, and generate revenue to offset expenses incurred to provide such facilities to residents and users. Approximately 260 expenditure leases are managed to provide facilities throughout the county for departments and their employees to support the delivery of services in locations convenient to the residents served.

RESA also provides appraisal, acquisition and relocation assistance for county departments and, upon request, to other agencies including San Bernardino Associated Governments (SANBAG), the State of California, and various cities. The department establishes values and acquires the necessary rights-of-way needed to complete public safety projects, including the construction and maintenance of transportation corridors and floodways. The department also acquires land and facilities for various functions, disposes of property determined to be surplus to the county's needs, and maintains an inventory of all county land and facilities.

2007-08 SUMMARY OF BUDGET UNITS

	Appropriation	Revenue	Local Cost	Fund Balance	Staffing
General Fund					
Real Estate Services	2,647,980	1,542,667	1,105,313		24.0
Rents and Leases	101,179	101,179	-		-
Courts Property Management	437,165	392,165	45,000		-
Total General Fund	3,186,324	2,036,011	1,150,313		24.0
Special Revenue Fund					
Chino Agricultural Preserve	7,105,752	1,160,648		5,945,104	-
Total Special Revenue Fund	7,105,752	1,160,648		5,945,104	-
Total - All Funds	10,292,076	3,196,659	1,150,313	5,945,104	24.0

GOALS, OBJECTIVES, AND PERFORMANCE MEASURES

GOAL 1: IMPROVE THE QUALITY AND PROFESSIONALISM OF SERVICES

Objective A: Initiate the use of architectural and design firms to develop architectural programs and space plans to define space needs and relationships among tenant functional units.

Objective B: Develop individual project schedules with milestones and critical completion dates.

MEASUREMENT	2005-06 Actual	2006-07 Actual	2007-08 Target	2007-08 Estimate	2008-09 Target
1A. Percentage of leases in new locations in excess of 5,000 square feet for which architectural and space design plans have been completed.	N/A	N/A	100%	75%	100%
1B. Percentage of projects (leases for more than 10,000 square feet of space or acquisitions that include five or more parcels) utilizing a project schedule.	N/A	No Projects	100%	No Projects	100%

Status

The goal and stated objectives to improve the quality of professionalism by initiating the use of architectural programs and space plans, and project schedules with milestones and critical completion dates, were not accomplished in 2006-07 because no new projects were requested of RESD that fit the criteria for the use of these tools. In 2007-08, an estimated four projects will be requested of RESD that fit the stated criteria, one of which is a project for a department in Human Services (HS) that is a carry-over from the previous year, and for which HS has completed the plans and specifications. Therefore, only 3 of 4 (75%) of projects in 2007-08 will have had architectural programs and space plans prepared by architectural firms. None of the projects has commenced; therefore, no project schedules have been utilized. Once fully initiated, the use of professional firms and project schedules will enable RESD to more quickly and efficiently initiate and manage projects.

GOAL 2: IMPROVE THE DEPARTMENT'S FISCAL SERVICES BY AUTOMATING MANUAL FISCAL FUNCTIONS AND SYSTEMS

Objective A: Identify opportunities to streamline existing manual systems, eliminate duplication of effort, and increase efficiency.

Objective B: Improve customer service by increasing the number of lease adjustments such as annual rental increases in a timely and accurate manner, in accordance with contract terms.

MEASUREMENT	2005-06 Actual	2006-07 Actual	2007-08 Target	2007-08 Estimate	2008-09 Target
2A. Increase the total percentage of 260 fiscal tasks that are automated. (Number of fiscal tasks automated.)	N/A	N/A	62%	62% (160)	77%
2B. Increase the total percentage of 260 expenditure leases adjusted timely and accurately, in accordance with contract terms. (Number of expenditure leases.)	N/A	N/A	90%	80% (208)	90%

2006-07 ACCOMPLISHMENTS

- ❖ Commenced transfer of Court Facilities and property management to the Administrative Office of the Court
- ❖ Completed acquisition of Right-of-Way for Pepper Avenue and Valley Blvd. intersection realignment
- ❖ Assumed property management and planning for County-owned dairies in the Chino Agricultural Preserve



Right-of-Way Agents working on the State Street Grade Separation Project in San Bernardino



Real Property Agents leasing new office space for Preschool Services Department

Status

The second goal for RESD is to improve the department's fiscal services by automating functions and services that are currently performed manually. The objectives are to streamline the processes, eliminate duplication and increase efficiency and productivity; adjust predetermined rental increases in a timely and accurate manner; and use available technological resources to affect the transition from manual to automated systems.

In 2007-08, RESD made progress toward this goal by switching to a new Labor reporting system (eTime), and is currently partnering with the Information Services and Architecture and Engineering Departments to develop a new system for charging out services. When implemented, the new system will reduce staff time spent calculating charges and preparing documents to bill customers.

The percentage of expenditure leases expected to be adjusted according to contract terms in 2007-08 was targeted at 90%; however, minor problems were encountered during the transition to a different and improved procedure which resulted in only 80% of adjustments having been done timely. Procedures for identifying and communicating lease adjustments have been reviewed and refined. In 2008-09, the department projects improvement of at least 10% over the previous year.

GOAL 3: IMPROVE CUSTOMER SERVICE WITH DEPARTMENTS THAT LEASE NON-COUNTY OWNED SPACE AND/OR LEASE COUNTY-OWNED SPACE TO OTHERS

Objective A: Continue to conduct standing monthly (quarterly where appropriate) meetings with departments to promote the exchange of information and initiate the development of project schedules.

Objective B: Monitor and update data, and use reports developed in the Computer Aided Facilities Management (CAFM) system as a tickler system and portfolio management tool.

MEASUREMENT	2005-06 Actual	2006-07 Actual	2007-08 Target	2007-08 Estimate	2008-09 Target
3A. Percentage of leases, appraisals, and surplus property sales completed within the projected schedule.	N/A	87%	100%	100%	100%
3B. Percentage of amendments submitted for Board approval at least 30 days prior to the scheduled termination date of the existing lease. (Base rate is 10%)	N/A	81%	100%	90%	90%

Status

In 2007-08, goals and objectives to improve customer service by continuing to conduct standing monthly or quarterly meetings with departments in order to promote the exchange of information and initiate the use of project schedules was accomplished, although, no projects were initiated for which a project schedule could be utilized. The monitoring and updating of data and the use of reports developed in the Computer Aided Facilities Management (CAFM) system, was also accomplished; however, a dynamic real estate market caused protracted negotiations for a number of lease renewals, which will result in only 90% of lease renewals being presented to the Board for approval at least 30 days prior to the scheduled termination date. RESD will continue the goal of improving customer service by pursuing these objectives even as other, new objectives are identified and pursued. These standing meetings and the use of technology have enabled management of RESD to more easily identify and respond to problems, issues and the need for additional training among the staff.

2008-09 REQUESTS FOR ADDITIONAL GENERAL FUND FINANCING (POLICY ITEMS), INCLUDING NEW CAPITAL IMPROVEMENT PROGRAM (CIP) PROJECTS, OR BUSINESS PROCESS IMPROVEMENT (BPI) RESERVE FUNDS

The department is not requesting any additional general fund financing for 2008-09.

2008-09 PROPOSED FEE ADJUSTMENTS

The department is not requesting any proposed fee adjustments for 2008-09.

If there are questions about this business plan, please contact David H. Slaughter, Director, at (909) 387-7813.

